

ACCOUNT INQUIRY/MAINTENANCE: SEARCH

What You Need To KNOW	What You Need To DO
<p>Purpose:</p> <p>The purpose of this procedure is:</p> <ul style="list-style-type: none"> To access Individual Accounts within the A/POC's span of control and security profile. To search for an account easily and navigate from screen to screen in order to review and maintain information. <p><u>Rules:</u></p> <ul style="list-style-type: none"> This search will only return Individual Accounts and will not consider or return Vehicle Accounts and Central Accounts. You must select one of the available "Search By" options. The search screen will display with the user's default hierarchy. A wildcard search can not be used in conjunction with any other wildcard search. (Only one wildcard search per field is allowed.) You may use the Submit or Clear buttons at the top or at the bottom of the screen. <p><u>Search By Field Descriptions:</u></p> <p>Account Number</p> <ul style="list-style-type: none"> This field supercedes any other search criteria entered within this screen. You may enter other fields within the screen, however, since this is a unique field all other criteria will be ignored. <p>Last Name</p> <ul style="list-style-type: none"> This field will permit a wildcard search. To perform a complete search, the full last name must be entered with one of the following: <p>Optional Criteria / First Name</p> <p>This field is optional and may be used in conjunction with a full search by last name. It also allows a wildcard search.</p> <p>Optional Criteria / Zip/Postal Code</p> <p>This field is optional and may be used in conjunction with a full search by last name. It also allows a wildcard search.</p>	<p>INDIVIDUAL ACCOUNT SEARCH</p> <ol style="list-style-type: none"> Click on Account Inquiry/Maintenance from the EAGLS Main Menu, <u>Result:</u> The Account Inquiry/Maintenance Search screen displays with user's default hierarchy. Click on the radio button next to the desired Search For criteria <ul style="list-style-type: none"> ◇ Open Accounts (default option) ◇ Closed Accounts ◇ All Accounts Click on one of the following Search By option and type in the criteria: <ul style="list-style-type: none"> ◇ Account Number ◇ Last Name <ul style="list-style-type: none"> – First Name: (optional field used in conjunction with a search by last name) – Zip/Postal Code: (optional field used in conjunction with a search by last name) ◇ Business Phone (numeric fields only, please select one) <ul style="list-style-type: none"> – US or Canada – OR – International ◇ Social Security # ◇ Hierarchy Depth <ul style="list-style-type: none"> – <u>Browse Hierarchy</u> <p><u>Result:</u> Typed search criteria displays.</p> <p>To view a hierarchy level below your hierarchy level access, complete steps 4 or 5 then 6 and 7; otherwise go to step 8.</p> Type in Hierarchy Level number(s) if you are searching by hierarchy <u>Result:</u> Available hierarchies appear listing hierarchy descriptions and agency names. <p style="text-align: center;">OR</p> <ol style="list-style-type: none"> Click on <u>Browse Hierarchy</u>



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<p><i>Wildcard searches may be performed by one of the following methods:</i></p> <ul style="list-style-type: none"> entering the first two characters in the Last Name field followed by an (*), entering the entire last name and two characters in the First Name field followed by an (*), entering the entire last name and two digits in the Zip/Postal Code field followed by an (*). <p><i>Partial searches take longer to complete than exact searches. With any wildcard search, a minimum of two characters must be entered and only one wildcard field per search is allowed.</i></p> <p>Business Phone Number</p> <ul style="list-style-type: none"> This field allows the A/OPC to search by the account holder's phone number. All phone number fields are numeric fields only. You can not type special characters such as, [](-/#*@], etc. in the telephone and fax fields. You can not enter both a US/Canadian phone number and International phone number. <p>Example: If you have a number currently in the Business Phone Number for US/Canada, and then you click in the International field box, the US/Canada number will automatically be removed from view.</p> <p>Social Security #</p> <ul style="list-style-type: none"> This field allows you to search by the account holder's social security number. All fields must be populated. <p>Hierarchy Browse</p> <ul style="list-style-type: none"> This field allows you to "browse" through a list of Hierarchy levels within your span of control using the 40-character length descriptive name. Occasionally a "Session Unavailable" message may display. To continue, close the message box or pop-up window, and attempt another hierarchy browse. If the message displays again, log off of EAGLS and log back on. 	<p>INDIVIDUAL ACCOUNT SEARCH – continued</p> <p><u>Result:</u> A pop up window will appear that displays the parent and all available hierarchies</p> <p><i>Note: The Next Level and Previous Level buttons will move you between hierarchy levels within your span of control.</i></p> <ol style="list-style-type: none"> Click on the desired hierarchy description <p><u>Result:</u> The hierarchies within your span of control will display on the pop up window</p> <ol style="list-style-type: none"> Click on Select <p><u>Result:</u> The Account Inquiry/Maintenance Search screen displays and will populate the appropriate Hierarchy number and description fields.</p> <ol style="list-style-type: none"> Click on Submit <p style="text-align: center;">OR</p> <ol style="list-style-type: none"> Click on Clear to restore all fields back to the original values <p><i>Note: When using a Search By option other than account number, multiple search results may display. Click on the account number you want to access.</i></p> <p><u>Result:</u> The Account/Inquiry Maintenance screen displays</p>